A Review of the Literature

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In recent years, a number of common issues and trends in special education have been highlighted in the literature and virtually all new policy frameworks and reviews commissioned by governments in Canada and other countries have referenced the need to address them.

This literature review integrates previous reviews conducted on behalf of Alberta Education in the past few years and adds more recent literature from Canada and the United States, Europe, and other countries. The purpose of the literature review is to help inform Setting the Direction for Special Education in Alberta.

POLICY DIRECTION IN INCLUSIVE EDUCATION

Philpott (2007a) describes a significant change in society's views of special education, from segregation, to integration, to inclusion. He asserts that there has been a global shift in methods used to address diverse learning needs, describing it as a paradigm shift away from a "deficit/medical model toward a philosophy of inclusion." He indicates how important this is for Canada given its growing cultural and linguistic diversity and offers the following chart to describe it.

Paradigms of Care

Special Education	Inclusive Education
• Founded in a medical model	• Founded in civil liberties
• Asks what's wrong with the child	• Asks what's wrong with the environment
• Focus on deficits	• Focus on strategies
• Prescriptive	• Malleable
• Diagnoses diversity	• Values diversity
• Tolerates differences	• Embraces differences
• Takes child out	• Keeps child in
• Resource-building	• Capacity-building
• Relies on an external "expert"	• Teacher/parent as expert
• Professionalized	• Personalized
• Mandated	• Community supported
• Eurocentric culture	• Indigenous culture

Philpott reflects on a conceptual shared history between the special education paradigm shift and Canada's appreciation of Aboriginal culture. Both experienced periods of segregation, integration and now, inclusion. And yet the current view of inclusion matches the longstanding Aboriginal perspective: "that individual difference is important to group survival and is central to native faith, which affirms that all things and all people should be respected for their inherent value and worth."

Philpott (2007b) views the 1966 Canadian Commission of Emotional and Learning Disorders in Children (CELDIC) as a turning point in the understanding of inclusive education for Canada, noting that three main educational concepts on inclusion grew out of the findings and recommendations:

1. Every child has the right to the education required to realize his or her full potential.

2. Financing of education for all students is the responsibility of the educational authorities.

3. Students with exceptional learning needs should remain integrated with other students as long as possible.

He notes that the 1990s witnessed much criticism of special education, but resulted in a wealth of research to provide direction today, including a better understanding and appreciation of inclusive education. He asserts that we are at a point where we need to close the gap between research and practice.

Inclusive Education and the Charter of Rights

In Canada, the Charter of Rights and Freedoms presents a dual obligation in terms of the right to be included (or belong) and the right to benefit from an education without discrimination. Canadian jurisdictions are expected to ensure these rights from a "best interests of the child" perspective and make accommodations in their education systems accordingly.

In preparing a special education policy framework for New Brunswick, MacKay (2006) provides a concise review of obligations under the Canadian Charter of Rights and Freedoms, and the human rights legislation of respective provincial jurisdictions. MacKay identifies the relevant legal tests and principles used by the courts in interpreting the Charter of Rights as follows:

• Individual Accommodation: Based on Eaton v Brant a "best interests of the child" test prevails which takes into account the benefits of social inclusion. And based on the separate decisions referred to as Meiorin and Grismer, the duty to accommodate means to the point of undue hardship which may take the form of impossibility, serious risk or excessive cost.

• Systemic Accommodation: In addition to individual accommodation, an institutional perspective is taken in assessing whether exclusionary practices exist, including those that may occur naturally in a system. Elbridge, Meiorin, and the Abella Report decisions provide the basis for this principle.

With this line of reasoning, equal rights and freedom from discrimination mean not only an expectation to accommodate an individual into an existing process defined by law, but also an expectation to adapt the existing structures so that the service or benefit provided is "available, accessible, meaningful and rewarding" for the individual or the group of interest.

MacKay advises that education systems will need to be diligent in monitoring their policies, goals and practices, identifying institutional barriers and ensuring they are adapting accordingly. He states that as "expectations of all parties rise with regard to individual accommodations, setting reasonable limits will be a complex and important but also very delicate task." A key question is how an education system can navigate a proper course that will address individual accommodation but also focus on systemic change to reduce the need for individual level accommodation.

Other Countries

Hardman (2006) describes the evolution of special education policy in the United States over the last 30 years starting with the complete exclusion of many students with disabilities in the early years. By 1975, with increased litigation regarding education for the disabled, the US government passed the Education for All Handicapped Children Act. This act later became the Individuals with Disabilities Education Act (IDEA) in 1997. The legislation describes the process of providing the appropriate educational experience for students with disabilities, with its basic tenets including:

- Eligibility based on nondiscriminatory and multidisciplinary assessments
- Parent involvement and consent
- An individualized education program
- Educational placement in the least restrictive environment.

For the first 20 years, federal policy was directed primarily at ensuring access to education for students with disabilities. Since that time, policy has changed emphasis from accessibility to accountability. In 1997, IDEA linked the concepts of educational benefit and meaningful progress, to accessing the general curriculum and participating in the same assessments as students without disabilities. In 2004, IDEA included provisions regarding Response to Intervention (RTI) for documenting the existence or nonexistence of a learning disability.

A review of special education policies in Australia, the United States and the United Kingdom identified three principle drivers of inclusion: social justice principles legislation, and research findings (Foreman and Arthur-Kelly 2008). Social justice principles, first articulated in the 1960s and 1970s include normalization, least restrictive environment and age-appropriateness. These are central to the inclusive education movement.

In some countries, the principle of inclusion is supported by legislation requiring school systems to provide regular classroom placement as a first option, and to provide special education services where the student attends school. Some countries include a clause in their legislation regarding "the provision of efficient education for other children," providing what may be viewed as a significant "let-out" clause that allows schools to refuse entry to a student with a disability if it is thought the student would disrupt the class and interfere with the education of other students.

In Australia, inclusive schooling is educational policy rather than law, and a set of education standards applies to public schools, private schools and post-secondary providers. The areas covered in the standards are:

- Enrolment and admission – a person with a disability must be able to seek admission and receive advice and support on the same basis as a person without a disability, and without discrimination.
- Participation – students with a disability must be able to participate in courses or programs without discrimination.
- Curriculum development, delivery and accreditation – all students must be able to participate appropriately in learning experiences.
- Provision of student support services – a student with a disability must be able to use services other students use or, if necessary, to access specialized services.
- Harassment and victimization – processes must be developed to prevent harassment or victimization of students with a disability.

Unreasonable accommodations or adjustments are not mandated; a provider can offer a defense that the required adjustments would produce unjustifiable hardship, considering the financial circumstances of the provider and the cost of the adjustment.

Victoria has taken a leading role in Australia in establishing a system in which students with special education needs attend non-segregated settings. There have been shifts in the funding system from disability category to a focus on students' learning needs, wide-scale implementation of a whole-school approach to students' difficulties in reading and a shift to a more integrated, multidisciplinary approach to curriculum. However, Wu and Komesaroff (2007) report that key difficulties and challenges remain including: an identified shortfall in funding for students with disabilities in mainstream classes, teachers' general lack of professional knowledge and skills to address the needs of the diverse student population, lack of evaluation of the whole-school approach for students with disabilities, and the lack of comprehensive information about the outcomes for students with special education needs.

In New Zealand, education is highly decentralized with each school having its own board, and market-driven with schools competing for students and resources. Like several other countries, New Zealand has a philosophy that expects special needs students to be educated in the regular classroom with the same national curriculum as all other students. However, it is noted that the direction is accompanied by targeted funding to a reduced number of students with special needs. Wills (2006) states that bureaucratic demands and costs of funding services have stymied support for the policy by school principals, who are generally focusing instead on maintaining efficient and competitive schools.

In discussing educational inclusion in Scotland, Tisdall and Ridell (2006) note there have been three policy approaches toward inclusion:

- An individualized student approach – supporting or changing the child
- A systems approach – making schools inclusive for all
- An anti-discrimination, civil rights approach – challenging the mainstream.

An emphasis on the individual student has become the major focus, but all three policy directions play an ongoing role with the emphasis shifting over time.

In Northern Ireland, there have been a series of policy statements that strengthen the rights of children with special education needs to be educated in mainstream schools, but Northern Ireland also maintains a significant number of special schools and safeguards the efficient education of all pupils (Hunter and O'Connor 2006). Approximately 40% of pupils with special education needs are currently educated in special schools. A new national curriculum is intended to be pupil-centered with the stipulation that pupils with special education needs should have the same range of learning pathways available to other pupils. The authors observe that where inclusion flourishes, the role of the principal, early intervention strategies, placing a high priority on parental involvement, standards to promote achievement and lower levels of bureaucracy are key factors of success. Where inclusion was not promoted, the main barriers cited were inadequate training and guidance for teacher assistants, delays in accessing specialist support, large classes, lack of resources, and health and safety issues.

Regarding inclusive policy, there are three key directions identified by the research:

- Inclusion is being viewed less in terms of integration in the regular classroom and more as an attitude or outlook that recognizes and respects diversity in all its forms.

- Placement remains an important consideration, particularly in terms of social inclusion, with a continuum of placements recognized as necessary by parents and professionals.

- There are increasing efforts to proactively address the need for inclusive education through systemic change as opposed to individual level accommodation.

Policy statements on inclusion across Canada (Alberta Education fall 2008) emphasize equitable access to education including the benefits of education, and emphasize inclusion as a value or approach that goes beyond placement. The literature and public opinion support a continuum of placements for special needs students but opinions remain on what is deemed to be in the best interests of the child.

Studies indicate placement in general education may not be an acceptable alternative to some parents of children with either mild or severe disabilities; advocacy groups for the deaf, learning disabled and gifted are hesitant to embrace inclusive education as they see the potential of losing significant gains they have made in securing resources for their children (Polsgrove 2004, Timmons 2007). Others argue that some students with disabilities benefit from a more structured and clearly defined environment than general education classrooms can provide and may find general education more constricting than enabling (Ackerman undated, Zera 2000).

CURRICULUM

Curriculum is a broad term describing the learning outcomes, approved resources and assessment measures for each subject of study. The overarching question posed in the literature is whether there can be a single curriculum for all students, and, if so, what would it look like? The literature considers the changes required to make the curriculum accessible, engaging and meaningful for all students.

Some researchers take the position that access to the general curriculum and learning the same educational content is the only way students with disabilities can be as successful as their non disabled peers, while others note that teachers are concerned such access to the general curriculum may come at the cost of teaching critical functional and independent living skills (Hardman and Nagle 2004).

There is a heightened understanding that today's classrooms have a diverse array of learners and that education systems and teachers will find it more and more challenging to meet student needs if they do not shift from a one-size-fits-all mentality. Universal Design for Learning (UDL), differentiation and personalized learning are key concepts associated with this direction.

Differentiation and Universal Design for Learning

Villa, et al (2005) identify the importance of differentiation for curriculum development, instructional delivery and assessment and how important this is for the full range of learners, whether defined as at risk, as having a disability, being gifted or considered an "average" student.

By designing curriculum for a diverse set of learners, such as making the learning project-based or problem-based and integrated across subject areas, it is more readily differentiated and accessed by a variety of learners. Ferguson (2008) expresses a mind-set of planning for differentiation such that the teacher identifies how a lesson can be adapted to better meet the learner's needs. Through differentiated instruction the content (what is learned), process (how it is learned) and product (what is produced as evidence of learning), is differentiated as needed.

Villa, et al (2005) identify the key principle of Universal Design, which is to create a product so that it can be readily adapted for use by as many different people as possible, and indicate that Universal Design for Learning (UDL) provides each student with opportunities for learning, progress, achievement and participation.

Friesen (2006) identifies the three fundamental characteristics associated with UDL and the impact on the learner:

- Multiple Means of Representation. When students are presented with more than print resources, with resources available through digital media, for example, engaging in reading is more accessible for all students and many with special needs do not seem different in their pursuit of the activity.

- Multiple Means of Expression. Students with special needs who express their learnings in a supportive environmet, with relevant and ongoing feedback using a variety of media and styles are more apt to do well.

- Multiple Means of Engagement. Students who are afforded access to a variety of technology are motivated in their learning in a powerful, dynamic way.

Friesen also identifies the important role that computers and technology can play in support of the UDL framework. She indicates that digital technologies allow for multiple means of expression, representation and engagement; that technology affords ways to modify and accommodate to meet the diversity of learning needs. She goes on to state that teachers in such an environment tend to demonstrate a wide range of teaching strategies. Classrooms with access to wireless, mobile computer technologies and a full range of assistive technologies in combination with a variety of resources and sources of information foster an inclusive approach, providing an environment with physical, technical and personal conditions to meet the needs of all learners.

Personalized Learning is another key concept supporting the shift away from a "one-size-fits-all" approach. The OECD (2006) describes Personalized Learning as focusing on assessing strengths and needs of each student to then bridge between the two, building competence and confidence, relying on multiple pathways for meeting curriculum outcomes and accommodating different styles of learning.

A key question may be how to adapt the Individualized Program Plan (IPP), which has been a cornerstone of special education over the past 30 or more years, so that it becomes the tool for leveraging these learning concepts. Many professionals and parents state that the IPP has become mechanistic, concerned more with procedure and compliance than with results. One position is that the IPP be eliminated altogether as it has failed to meet its original intent as either an effective planning document or an accountability tool. Some argue that the general curriculum establishes the goals and objectives and so all that is really needed is a statement of the supports and accommodations provided so the student can access the general curricular outcomes (Hardman and Nagle 2004).

Capacity and building capacity refer to an educational system that has well-trained and supported staff who understand and address the diversity in the classroom. Teachers work with parents, principals, teacher assistants, educational psychologists or other specialists and many others in support of the child's education. Education assistants (EAs) and teacher assistants (TAs) are employed to help teachers address the needs of students with special needs and as such, are important members of the learning team, and it is clear that each member of the team requires ongoing training to keep current with the research findings and new technologies that become available.

Timmons (2007) indicates that even where there is general acceptance of inclusive education in principle, few Canadian educators feel adequately prepared in terms of professional skills, special education support and expertise, as well as necessary resources.

As part of a way of rethinking approaches to building capacity, Winn and Blanton (2005) note the importance of teacher collaboration in schools. Similarly, the authors note that collaboration has a place in teacher education and should bring together general and special education teachers in education programs. By bringing teachers together, both pre and post certification, there can be more effective discourse about the need for and the direction of change in school models.

Friesen (2006) notes the challenges associated with merging research with practical application in classrooms and advocates for teachers being willing to open up their classrooms to researchers. Part of the shift to a more empowering model has to be accomplished by staying current with the research into differentiated instruction and building inclusive environments. For the research to stay current, teachers need to become more involved in the practical application and source of research.

Leadership practices are changing due in part to the importance of public accountability for the educational performance of all students, including students who have disabilities. Lashley (2007) contemplates some of the changes that have occurred in special education and describes the importance of principals' leadership. Principals have a central role in creating a positive school culture where all learners and staff feel welcome and supported. Such a school culture, fueled by collaborative school-based teams, celebrates and supports diversity.

The following excerpt from Bennett and Wynne (2006) in their final report to the Minister of Education for Ontario, provides a recent example of how government commissioned frameworks in Canada are reflecting a current and common direction in inclusive education policy and practice.

All students would be expected to achieve both academically and socially. The first consideration regarding placement would continue to be the regular classroom. A range of placement options would continue to be available for students whose needs would not be met within the regular classroom. These placements would be duration-specific, intervention-focused, and subject to regular reviews. Expectations for student achievement would be agreed upon by educators and parents and clearly articulated. Classroom teachers would have ongoing training in a variety of successful practices, such as universal design and differentiated instruction, appropriate to the range of students in the class. They would have the expertise to deal with a range of students in their classrooms and would be supported in their work by informed school leaders and through the provision of appropriate material and personnel resources (e.g., curriculum experts, teachers' assistants, health professionals, and community-based support staff). Classroom teachers would be provided with opportunities to enhance their existing skills in order to collaborate effectively with teachers' assistants, caregivers, interpreters, and other support staff. (Bennett and Wynne 2006, p.8.)

The importance of building capacity is underscored by a recently commissioned framework on special education for the Government of Newfoundland and Labrador (2007) entitled Focusing on Students: The Report of the ISSP & Pathways. The report recognizes the importance of the shift away from a special education model that concerns itself with diagnoses prior to issuing supports, toward a model which empowers teachers with resources that promote differentiated instruction and inclusive environments.

COLLABORATION

George Bernard Shaw said, "I am of the opinion that my life belongs to the community, and as long as I live it is my privilege to do for it whatever I can."

Collaboration promotes a sense of belonging. Through partnership, participation in our diverse society has greater impact, and most importantly, collaboration sets into place a cornerstone for effective inclusion. (Schwartz et al n.d.). The literature provides examples of different collaborative models bringing together services from within and outside the school. Single integrated, holistic, full-service, coordinated service delivery and wrap around – these are some of the models of collaboration being developed.

Integrating Services

The literature describes a number of benefits of a "single integrated universal system" for children who are at risk of delays or disabilities. Rogers and Moore (2003) suggest that the outcomes for child development rest with the family, the neighbourhood, the community and the economy, underlining the value of cross-sector, multi-level strategies with strong local leadership.

The number of services integrated through a collaborative model may be as few as two or include many. The literature indicates it is vital (but difficult) to delimit service integration to a conceptually and operationally manageable number of services (Jehl 1999, Kolbe et al 1999). Soan (2006) maintains that decisions on integrating services should be made at a local level and focus on integrating services around the needs of the clients and not the convenience of public service provision. There are seen to be advantages to integrate around a particular service area such as parenting and pregnant teens, transition to work programs, or early intervention for students with disabilities rather than attempting to serve all student needs in a single system. Service integration is to be viewed as a process to improve access to service, not a magic bullet that alone will redress all social problems.

Aldrich (2000), Jehl (1999) and Ragan (2003) state that those who plan and implement an integrated service model must address a number of issues:

- Interagency involvement and commitment is frequently stronger at the upper management and policy-making level than at the direct service level.

- The size and complexity of human service systems at the federal or provincial level requires that the focus for integration be at the community level to be more manageable.

- There is usually a need for increased expenditure in initial phases to institute new mechanism for services and communication across agencies and providers.

- Change does not happen quickly; time, effort and resources must be put into any collaboration to address what can be negative impacts of a history of professionalism, specialization and bureaucratization.

School-linked Services

School-linked services are a variation of the integrated service model and operate in several forms. The literature uses a number of terms to describe this model including full-service schools, extended schools, wrap around services, school-linked comprehensive services and family service centres. The concept and practice of school-linked services has received considerable attention in the United States, Australia and the United Kingdom in recent years (Aldrich 2000, Dryfoos 2002, Kahn and Kamerman 1992, Kolbe 1999, Koppich and Kirst 1993). Interest in school-linked services has been raised by two forces – a renewed concern over social problems affecting learning, and political pressures to reorganize school, health and social service systems.

The majority of the interest and literature on school-linked services is from the United States, and based on a school perspective. While school-linked service models have been around for 20 years or more, the model has been implemented in relatively few sites. Currently the model is represented by a limited number of programs concentrated in poor urban school districts where there are large school communities and state funding initiatives to support them. In the United Kingdom, initiatives have focused on rural children and their families faced with a number of difficulties including poverty, poor housing and health and low educational attainment or urban inner-city problems of deprivation and alienation.

Full-service schools operate on the belief that health and social agencies, not education agencies, need to provide the necessary resources to address the critical health and social needs of students, and these resources should be provided in ways that will most support and least disrupt the educational mission of schools. Since most full-service schools are designed for at-risk children and their families, services should provide three functions:

- Prevention. Services could include adult education, immunizations, family planning, recreation, after-school care, social services funding, job placement, early childhood education, mental and physical health screening, drug and alcohol prevention, dropout prevention, school meal programs, child care.

- Early Intervention Services. Guidance and counseling, tutoring, public health care, conflict resolution, child abuse education, juvenile alternative services, latch-key services are examples.

- Intensive Treatments. Treatments for chronic disabling conditions, special education, case management, emergency and crises are examples.

To perform these functions, full-service schools should ideally be open to students, families and the community before, during and after school, seven days a week, all year long.

Recent research literature on specialist services in schools has shown that there has been a paradigm shift from traditional medical models to models that focus more on education and consultation. The following elements of the paradigm shift were identified by many of the researchers.

Paradigm Shift in Specialist Service Models

From	To
• Discipline focus	• Education focus
• Discipline specific goals and interventions	• Discipline specific only as necessary for the student to function effectively in the school and classroom
• Assessment for eligibility or funding	• Assessment for educational programming
• Student as client	• School as client
• Interventions focused on changing the student	• Interventions focused on changing the environment
• Planning focused on the individual student	• School-wide planning first, then planning for at risk students, then the individual student
• Remediation - students already failing	• Prevention - students who are at risk
• Assessment and diagnosis	• Problem-solving
• Focus on individual differences	• Focus on environmental and social variables
• Emphasis on disabilities and deficits	• Emphasis on strengths, what the student can do
• Medically trained specialists	• Educational specialists
• Working independently	• Working as part of a team
• Providing services external to the school (e.g., a clinic)	• Providing services within the school
• Direct intervention	• Consultation and training others to intervene

In Australia, the Claymore Integration Project was developed to provide a variety of services from multiple service providers through a coordinated approach. The project involved several key elements, including integration of services in the community, integration of services based on community needs and integration of services with each other (Fine et al 2005). In New South Wales, Australia, there has been a shift from specialized services offered in isolation to a holistic approach, which brings together innovation, with coordinated and integrated services. This approach is also identified as streamlined and cost-effective (Fine et al 2005).

The New South Wales Schools as Community Centers Program supports an integrated service delivery model that meets the needs of families with young children (ages 0-8 years). The school is the hub of service and activity linking families with education, health and community services. Four of the program's pilot areas were evaluated, showing results that exceeded expectations (Fine et al 2005).

Legislated Frameworks

The United Kingdom is a leader in the development of frameworks to serve children and youth in a co-operative manner across the health, social service and education service delivery networks. The Children Act of 2004 provided a legislated mandate to serve children in a co-operative manner for the purpose of improved well-being. Identified partners across government service networks were obliged to establish agreements or plans including the pooling of funds, and were required to publish the plans.

In 2007, The Children's Plan: Building Brighter Futures was developed for the United Kingdom's Department for Children, Schools and Families. According to this plan, bringing services together in the places where children and their families visit provides many advantages including a one-stop shop for parents; staff who are co-located tend to talk to each other and streamline supports; informal co-operative working practices among the staff; and linkages with local communities to be more responsive to the local needs. The plan outlines a vision for parents, the community, government supports and services, the voluntary sector and business community working together to provide opportunities and deal with issues. Children's Trusts support the Plan at the local level.

Children's Trusts provide added governance and protocol around the legislated duty to co-operate and are intended to ensure it becomes a reality. They are led by the local authority responsible for bringing the various government agencies together and they ensure:

- A child and family-centered approach based on an outcome-led vision
- Inter-agency governance
- An integrated strategy with joint planning including pooled and aligned budgets, supported by a larger Children's Plan
- Integrated processes with a shared language and shared processes
- Develop and promote integrated front line delivery organized around the child, young person or family and not around professional or institutional boundaries.

The government of Newfoundland and Labrador developed the Model for the Coordination of Services to Children and Youth. The various government departments involved are mandated to support children and youth from birth to 21 years. The departments recognize that services cannot be fully effective if provided in isolation. Children and youth must be served within the context of families and communities where they live. The integrated service approach is intended to build on existing services, avoid duplication and at the same time enhance the role of parents/guardians and their children. A common Individual Support Services Plan (ISSP) is to be used. All partners are now able to share information about the child/youth through the development of an Information Sharing Protocol. All departments and agencies are to use a common consent form. (Government of Newfoundland and Labrador 1997).

Quebec's legislated direction to collaborate was instituted in 2004 with an Act Respecting Local Health and Social Services Network Development Agencies. The education system or network was brought in through the expanded framework: Two networks, one objective: the development of youth. There is a commitment at the provincial, regional and local levels to promote coordinated service delivery across the education and health and social services networks. Regional and local authorities and government agencies enter into agreements with reference to their respective legislated mandates and they complete a Memorandum of Understanding template. Such agreements are based on the objective of providing continuous and coordinated services pertaining to "youth with handicaps, social maladjustments or learning disabilities" (Government du Quebec 2008).

The legislated frameworks are not without their challenges but they appear to be addressed as they arise. Some have included information sharing, consent to release information, drawing in more service networks as needed, and realizing that potential cost savings do not necessarily appear at the start.

The Wrap Around Model

Peterson (2009) and Bruns et al (2004) describe collaboration as one of many principles in a model of service known as the wrap around model. Peterson says, "Family/student voice and interagency collaboration ensures that supports for families, teachers, and other caregivers are an essential part of [the wrap around process]." Bruns et al (2004) describe the ten principles of the wrap around process as:

- Family voice and choice
- Natural supports
- Team-based
- Collaboration
- Community-based
- Culturally competent
- Individualized
- Strengths-based
- Persistence
- Outcome-based

Wrap around service may be housed in a public school building and open to the community seven days a week throughout the year. Such a school would be operated and financed by both the school and the community agencies housed within it. Full-service community schools, according to Dryfoos (2002) revolve around this partnership and as such overcome barriers to learning.

Wrap around services are not so much a program or service but may be viewed as a process (Craig 2008) involving what can be described as 'the learning team'. Vital members of the learning team include students, parents, teachers and specialized services providers. As Craig notes, it is a process whereby teachers, families, relevant friends, community representatives, and service providers are brought together in a coordinated and mutually supportive way.

Dryfoos (2002) and Muijs (2007) refer to the need to focus on managing wrap around schools. They state that:

- "Many children in troubled schools feel isolated as the result of a widening gap between social classes and races

- School doors are now open to outside agencies that want to help and can bring the much needed resources with them.

- Multi-agency work has been promoted as key to helping schools address the various needs of children and their parents, especially in disadvantaged locations.

- Studies have shown some evidence that this approach has been effective in:
  - improving school attendance and behaviour in the classroom;
  - reducing suspensions and high-risk behaviours such as substance abuse, teen pregnancy,
  - increasing parent involvement,
  - lowering rates of child abuse and neglect among participants,
  - lowering rates of violence.

- However, management of these different programs will require high level collaboration between schools and multi-agencies.

- Synchronizing this work is complex and challenging and will require full cooperation of all stakeholders and not just top management."

Used as a tool for building networks, relationships, collaborations, and supports for children and students with emotional or behavioural challenges, wrap around services can deliver "one consistently implemented, carefully monitored service plan, and the family has a strong voice in creating and implementing the plan." (Peterson 2009).

The majority of recent literature on specialist service models, relevant to education, focuses on collaborative or integrated services including full-service schools. Despite this interest and focus, few evaluations of the costs or benefits of integrating various education, health or other human services, have been conducted.

Accountability in education denotes a system for informing those inside and outside the educational arena of the direction in which schools are moving, and the pace of the movement. Historically, the emphasis for special education was placed on fiscal and procedural accountability, although the focus has recently shifted to educational outcomes (Harr et al 2008). The focus on the use of "high-stakes" system-wide testing as the primary method of school accountability appears to be primarily a North American phenomenon, judging from the research literature on the topic.

Accountability Models and Principles

Finn (2002) identifies four versions of accountability that apply to educational reform. The first is compliance, which places emphasis on adherence to expected processes and whether resources are adequate and properly deployed. The second is professional norms and expertise, which is based on deferring to the position of professional peers and colleagues. The third is standards-based reform which is a top-down externally imposed strategy that stipulates what children are expected to learn, tests to see whether they've learned it, and imposes consequences depending on how well learning has taken place. The fourth type of accountability is a marketplace model where schools are directly answerable to their customers, and public schooling competes with private and charter schools, virtual schools and other forms of school choice, and vouchers may be provided to facilitate choice. In actuality, there are frequent pairings of two approaches such as the current American approach which is based on compliance and standards-based assessment.

Rationales for accountability mechanisms range from a policing vision (schools will only work well with tight direction and close monitoring) to a more collegial formative vision (schools require a systematic source of well informed feedback about their work) (Crooks 2003). Reflecting the New Zealand experience, Crooks leans toward the latter vision and sets out six criteria for "intelligent accountability":

- Accountability that preserves and enhances trust among the key participants in the accountability process

- Accountability that involves participants in the process, giving them a strong sense of professional responsibility and initiative

- Accountability that encourages deep, worthwhile responses rather than surface window dressing

- Accountability that recognizes and attempts to compensate for the severe limitations of our ability to capture educational quality in performance indicators

- Accountability that provides well-founded and effective feedback, promotes insight into performance and supports good decision making about what should be celebrated and what should be changed

- As a consequence of the accountability process, the majority of participants are more enthusiastic and motivated in their work (or at least not less enthusiastic and motivated).

In a similar vein, Jones (2004) identifies the following areas in which schools should be accountable: the physical and emotional well-being of students, student learning, teacher learning, equity and access, and improvement. He also states that schools should be held accountable to their primary clients: students, parents and the local community rather than to state and federal governments. However, recognizing that government accountability systems will continue, Jones suggests the following proper roles of the system level approach:

- It should serve to improve student learning and school practices and to ensure equity and access, not to reward or punish schools
- It should provide guidance and information for local decision making, not classify schools as successes or failures.
- It should reflect a democratic approach, including a balance of responsibility and power among different levels of government.
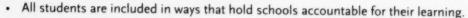
With respect to assessing student learning, Jones states that accountability should follow principles of high-quality assessment in a system that:

- Is primarily intended to improve student learning
- Aligns with the local curricula
- Emphasizes applied learning and thinking skills, not just declarative knowledge and basic skills
- Embodies the principle of multiple measures, including a variety of formats such as writing, open-response questions and performance-based tasks
- Is accessible to students with diverse learning styles, intelligence profiles, exceptionalities and cultural backgrounds.

In Accountability for Students with Special Needs: A Review of the Literature (An Interim Report), Management Resources (2001) note four purposes for assessing education outcomes identified by Ysseldyke and Thurlow:

- Program improvement – data can help identify strengths and weaknesses in instructional programs and the knowledge can be applied to improve programs
- Accountability – data are collected to document the extent to which expected outcomes are being achieved and the degree to which a jurisdiction is meetings its obligations; there are usually consequences for strong or poor performance
- Public information – data is reported in ways that demonstrate the extent to which outcomes are being achieved
- Policy formation – data helps decision-makers select from an array of alternatives for establishing a policy.

The Education Policy Reform Institute and the National Center on Educational Outcomes developed six principles of inclusive assessment and accountability systems (Thompson, 2003, Thurlow, 2008) that have a stronger focus on system-wide academic assessments. These principles are supported by a number of characteristics that define the principle in more detail.

- All students are included in ways that hold schools accountable for their learning.
- High quality decision-making determines how students participate.
- Public reporting includes the assessment results of all students.
- Accountability determinations are affected in the same way by all students.
- Continuous improvement, monitoring, and training ensure the quality of the overall system.
- Assessments allow all students to show their knowledge and skills on the same challenging content.

Areas of Accountability

In the late 1980s, the OECD initiated a project on International Indicators of Education Systems (INES). Scheerens (1995) reported INES indicators in three areas:

- Educational programs and processes - resources expended, resources applied, instructional content, decision-making characteristics, instructional time, schooling processes, staff characteristics, expectations and attitudes
- Educational Outcomes - completion, status after schooling, opinions/perceptions, learning and other results
- Demographic and economic background - demographics and socioeconomic characteristics of population, public support, financial resources available.

Shortly thereafter, the American National Center on Educational Outcomes (NCEO) reported that most accountability programs for students with disabilities should include input and process data as well as outcome data to provide information on the contexts in which children learn:

- Input data helps to plan future budgets, identify the cost-efficiency of programs, and indicate the needs of groups of students (includes information on program resources and student characteristics).
- Process data includes information on the type and quality of and access to certain programs (including opportunity to learn, inclusion in general education, teacher expectations, relationship of IEPs and instruction).
- Outcome data provides crucial information for making decisions about whether education is working for students.

NCEO has published many reports on special education accountability since the early 1990s.

For years, the primary, or perhaps sole, accountability instrument for special education outcomes was the Individualized Program Plan (IPP), which outlined learner expectations, assessment strategies and performance standards. Its strength was the focus on the individual student, and its weakness was that such a focus cannot provide system level information on specific populations (Ysseldyke et al 1998b). The desire to look beyond the individual at the special education system led to the gathering of some academic, social, attitudinal and behavioural results, usually through a standardized assessment system.

NCEO developed a framework for special educational accountability, purported to be a balanced system that includes system standards, inputs and processes and student outcomes (Ysseldyke et al 1998a). Outcomes and indicators were specified in the following domains:

- Academic and Functional Literacy (communication, problem solving and critical thinking, pre-academic skills, academic skills of mathematics, reading and writing, other academic and non academic skills, use of technology)
- Physical Health (age-appropriate physical development, access to basic health care, physical fitness, awareness of safety, fitness and health care needs, healthy lifestyle choices)
- Responsibility and Independence (age-appropriate independence, responsibility for self, gets about in environment)
- Contribution and Citizenship (compliance with rules, limits and routines, responsibility for tasks at home and school, compliance with school and community rules, volunteering, voting)
- Personal and Social Well-Being (coping effectively with personal challenges, frustrations and stressors, possess a good self image, get along with other people, respect cultural and individual differences,
- Participation (presence in group/school activities, participation in group/school activities, school completion)
- Accommodations (students use enrichments, adaptations, accommodations or compensations necessary to achieve outcomes in each of the major domains
- Satisfaction (satisfaction of parents and students with educational experiences, parent satisfaction with students' educational services, community satisfaction with students' educational services)
- Family involvement (families access resources to support child, families demonstrate support and coping skills).

Academic Accountability

The primary focus of U.S. federal and state monitoring activities, and to lesser extent Canadian provinces, has been on improving educational results and outcomes for all children, including those with disabilities.

The underlying vision is the belief that students with disabilities can and should be expected to achieve the same academic outcomes as their peers without disabilities. In order for that to occur, high quality instruction, access to the general curriculum based on the same curriculum standards as used for typical students, and systematic standards-based formative and summative assessments must be in place to allow these students to achieve in spite of barriers related to disabilities. (Thurlow et al 2008)

Accordingly students with disabilities are included in achievement testing. Thompson (2003) notes public reporting of student performance on state assessments is becoming an increasingly important tool for ensuring that public schools are held accountable for all students. Prior to 1990, most states included 10% or fewer of their students with disabilities in state assessments. Now all students in the U.S. must participate in state assessment systems, and there continue to be issues about the ways in which students participate (general or alternate assessment), the treatment of accommodations in testing, and the reporting of results (Lehr and Thurlow 2003). The No Child Left Behind Act (NCLB) carries the belief that every child can learn and demonstrate progress toward challenging standards in core academic subjects. Moreover, school systems face sanctions if they do not improve performance of all students.

The Program for International Student Assessment (PISA) is used in 41 countries. Results for Finn students were among the top in mathematics and reading while American students scored below average. In looking for explanations for the variation in the results, Itkonen and Jahnukainen (2007) analyzed the institutional design and accountability policies in the U.S. and Finland. The authors found a difference in basic outlook between the two countries: in Finland achievement is conceptualized as a collective responsibility while in the U.S. the responsibility is viewed to rest largely upon the individual. American accountability policies are based on comparative success, which the authors believe is more likely to use sanctions as an implementation tool. Finnish accountability policies, framed around equity with success defined in absolute terms for students, are more likely to be implemented with capacity building instruments such as training and additional resources.

Other findings included:

- Finland's education system is highly centralized (curriculum, funding, and teacher training) while that of the U.S. is highly decentralized: this may account for the lower variability in student achievement results in Finland.

- High-stakes assessments in the U.S. focus on "competitive, normative success" and are used to compare performance of schools against proficiency standards, and media often report test results to rank schools. In Finland, success is defined according to an individual's achievement over time or relative to standards and do not lead to school or district rankings.

- In the U.S., early childhood services are targeted toward a small percentage of students who are disabled or disadvantaged. In Finland, early childhood health and education services are universal

- The Finnish system provides intensive interventions to a large portion of the elementary school population (approximately 28%) so they can master academic skills. This is done without formal disability identification. The majority do not require intervention after elementary school. In the U.S., referral, assessment and formal identification of disability is required before children receive special education services, but a much smaller proportion receive services.

New Zealand has a distinctly different accountability profile from that of Canada and the United States. There is little use of high-stakes testing except in the final three years of secondary school. Curriculum requirements now follow outcomes based models, but monitoring is primarily through school visitations in a review and assist model, and through school self-reviews. There is regular monitoring of the knowledge skills and attitudes of students in year four and eight on a four-year cycle, but with nationally representative samples of 1500 students. Testing is done individually or in groups of four students as many of the tasks are performance tasks; there is heavy use of videotaping to record student responses. This provides system accountability that identifies which aspects are improving, staying the same or declining nationally, and helps to determine priorities for curriculum change and teacher development. No information is provided about individual students or schools.

The preamble to IDEA 2004 states that almost 30 years of research and experience has demonstrated that the education of children with disabilities can be made more effective by having high expectations for such children and ensuring their access to the general education curriculum in the regular classroom to the maximum extent possible in order to:

- Meet developmental goals and, to the maximum extent possible, the challenging expectations that have been established for all children, and

- Be prepared to lead productive and independent adult lives, to the maximum extent possible.

The U.S. Department of Education (2008) has identified 20 performance indicators for special education:

- Graduation rates –percent of youth with IEPs graduating with a regular diploma compared to percent of all youth graduating with a regular diploma.

- Dropout rates - percent of youth with IEPs dropping out of high school compared to the percent of all youth dropping out of high school.

- Statewide assessments (participation, proficiency) - participation and performance of children with disabilities on statewide assessments (with or without accommodations, use of grade level assessment and standards or alternate assessment and standards)

- Suspension/expulsion rates - rates of suspension and expulsion by disability, race and ethnicity

- Least Restrictive Environment (ages 6-21) - percent of children with IEPs aged 6 through 21 removed from regular classes <21% or more than 60% of the day, or served in separate schools, residential placements or homebound or hospital placements

- Preschool - with typically developing peers - percent of preschool children with IEPs who received special education and related services in settings with typically developing peers

- Preschool outcomes - percent of preschool children with IEPs who demonstrate improved social-emotional skills, acquisition of knowledge and skills, use of appropriate behaviors to meet their needs

- Parent involvement - Percent of parents with a child receiving special education services who report that school facilitated parent involvement as a means of improving services and results for children with disabilities

- Disproportionate representation in special education - percent of districts with disproportionate representation of racial and ethnic groups in special education and related services

- Disproportionate representation in specific disability categories - percent of districts with disproportionate representation of racial and ethnic groups in specific disability categories

- Timely initial evaluation and eligibility after parent consent - percent of children who were evaluated and eligibility determined within state established timeline (35 school days in Washington)

- Transition of Part C (ages birth to 2) to Part B (ages 3 to 21) and with IEP by 3rd birthday - percent of children referred by Part C prior to age 3, who are found eligible for Part B, and who have an IEP developed and implemented by their third birthdays

- Secondary Transition IEPs - percent of youth aged 16 and above with an IEP that includes coordinated, measurable, annual IEP goals and transition services that will reasonably enable the student to meet the post-secondary goals

- Postsecondary outcomes - percent of youth who had IEPs, are no longer in secondary school and who have been competitively employed, enrolled in some type of postsecondary school, or both, within one year of leaving high school

- General supervision - correction of non-compliance - system identifies and corrects noncompliance as soon as possible but in no case later than one year from identification (including monitoring, complaints, hearings, etc.)
- Timely resolution of citizen complaints - percent of signed written complaints with reports issued that were resolved within 60-day timeline or a timeline extended for exceptional circumstances with respect to a particular complaint
- Timely adjudication of due process requests - percent of fully adjudicated due process hearing requests that were fully adjudicated within the 45-day timeline or a timeline that is properly extended by the hearing officer at the request of either party
- Resolution settlement agreements - percent of hearing requests that went to resolution sessions that were resolved through resolution session settlement agreements
- Mediation agreements - percent of mediations held that resulted in mediation agreements
- Timely and accurate state-reported data.

Critics of High-Stakes Accountability

The use of system-wide assessments for students with special needs based on the general education curriculum has many critics as well as supporters. Ravitch (2002) predicts that in the near term, American education will continue to be driven by two paradigms: the policy-makers paradigm which insists that the public school system must be subject to the same incentives and sanctions based on its performance as are other organizations, and the professional education paradigm which believes that the profession should be insulated from public pressure for accountability.

Concern has been expressed that federal and state governments, rather than providing guidance for improvement or adequate fiscal resources to schools, are imposing stringent requirements and sanctions. Some teachers believe that all students cannot reach the required standard, and suggest that the aim of system assessments should be on demonstrating growth rather than on absolute criteria. While the achievement focus may improve results in both general and special education, students with disabilities are unlikely to "catch up" to their peers that are not disabled. A system based on common standards that must be learned within a specified timeframe is not compatible with what we know about the characteristics of effective special education practice where the hallmark is individualization (Hardman 2006).

Under the principle of parental choice, schools are held accountable to improve their instruction and services. In practice, parents of students with disabilities may find themselves as a minority without influence (Jordan 2001). In most jurisdictions, they also have limited powers of appeal.

According to Ryan (2007), future policy decision will have to consider the following questions:
- Does a standards-based educational system have to include all students?
- Is it appropriate to include students with severe disabilities in common standards when the standards do not reflect their unique needs?
- Are the assessment scores of these students relevant to the scores of non-disabled peers?

Alternate Assessments

When students with disabilities are unable to respond meaningfully to standardized assessments in general education even with accommodations, states have developed alternate assessments to assess and report their learning (Lehr and Thurlow 2003).

Quenemoen (2008) has assembled a brief history of alternative assessment, and the following information is taken from that document. For the majority of students with disabilities the general education curriculum is used with adaptations as necessary. However for students with significant cognitive disabilities, the relevance of the general curriculum is not readily apparent. Alternate curricula have been used ranging from adapted early childhood curriculum in the 1970s to a functional skills model in the 1980s to a modified general curriculum in the 1990s.

Alternate assessments are designed for students whose exposure to content is too limited for them to participate in regular assessments even with accommodations. In the U.S. there is considerable variation in the percentages of these students across states ranging from less than one percent to nine percent who participate in alternate assessments. The most commonly used alternate assessment approaches for these students are the portfolio or body of evidence, rating scales or checklists, and IEP analysis.

A 2005 study of special education outcomes identified outcomes measured by rubrics on alternate assessments by states. These included (in order of frequency):
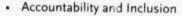
- Skill competence
- Level of assistance
- Degree of programs
- Number of settings
- Alignment with academic content standards
- Ability to generalize
- Appropriateness
- Staff support
- Social relationships
- Self-determination

Quenemoen (2008) notes that only the first criterion has been without controversy among measurement experts. She also indicates that states are continuing to have difficulty designing curriculum and alternate assessments that do not lose the integrity of grade-level content standards for students with the most severe disabilities.

Thurlow et al (2008), in detailing characteristics of a "principled approach" to accountability assessments for students with disabilities, discusses a number of promising best practices:

- Disaggregating data for various groups of students including those with disabilities or those using different accommodations as this information supports use of data for improvement of instruction and assessment
- Including "all" students in accountability systems, including those in private schools, charter schools, home school programs, online programs and institutional settings
- Training that emphasizes the linkage of curriculum, instruction and assessment

Reporting and explaining the number and percentage of students not assessed or whose results were not reported

- Accountability and Inclusion

Traditionally, difficulties with school and education have been considered to lie within the student, due to a disability, difference or disinterest. Ferguson (2008) notes that UNESCO research speaks of the importance of shifting approaches to identifying disability away from "diagnoses" toward careful assessment of the interaction between the student and the school environment. It has been suggested that school practices create barriers for many students, and much more attention should be directed at eliminating or reducing these barriers than diagnosing the student's disabilities. One approach suggested is the SETT framework where instructional planning actively considers the relationship among the student, the environment, the task and the tools (Zabala 2005, 2007). Jordan (2001) notes there continues to be a continuum of beliefs of educators ranging between two poles labeled pathognomonic (where educators seek to confirm and name or label the pathology) and interventionist (where educators seek techniques and materials to adapt instruction to learner characteristic), although the swing in recent years is toward the interventionist end of the continuum. Beliefs affect behaviours. Teachers with interventionist views are advocates of removal of barriers to learning for students with disabilities.

The Canadian Council on Learning (CCL) (2009) completed a systematic review of studies comparing the academic outcomes of students with special educational needs in inclusive settings with their counterparts in separate settings. Thirty studies, the majority in the United States but also in the United Kingdom and Canada, examined the academic outcomes of students with learning disabilities, Intellectual disabilities, language impairment and mixed disabilities in the two settings.

- On balance, inclusive settings appear preferable to separate settings for students with learning disabilities, although several studies had contradictory findings. The authors conclude that inclusive versus separate settings may not be the most important variable in predicting the outcomes of students with learning disabilities.

- There are only a small number of studies focusing on students with intellectual disabilities, but these suggested a high degree of practical benefit to inclusive settings for students with intellectual disabilities.

- Few studies focused on students with language impairments, but the evidence favours inclusion.

- Studies on students of mixed disabilities slightly favoured inclusion.

- Where included students with special education needs were successful, the settings were characterized by adequate support above and beyond those available to general education students.

The authors conclude their report by saying: "Inclusive settings appear not to academically disadvantage most students with special education needs" and in many cases appear to offer an advantage over separate settings. But the authors note that the results are not homogenous and effects are generally small in magnitude.

The CCL report goes on to state that instructional quality is probably a more important determinant of academic success, and that building capacity in teachers to educate students with special education needs is likely the most important step toward ensuring their academic success. Reasonable class size may also be an important factor in making an inclusive approach successful. The authors also note that since "the benefits of inclusion are not overwhelming...boards and schools may do well to ensure a range of services are available to support students with differing needs."

Accountability and Disability Identification

Some researchers argue that eligibility assessments based on a disability category have little relevance to the planning and delivery of instruction and result in a disproportionate representation of children from ethnically and culturally diverse backgrounds in special education programs (Hardman and Nagle 2004). In comparing the delivery of special education in Alberta and in Finland, Jahnukainen (2008) states:

The current Alberta model is based on a "psycho-educational" disability model with high pressure on specialized assessment and a complex coding system. In Finland, special education eligibility is based on observed educational needs and it is construed as difficulties rather than disabilities related to learning. As a consequence, though both countries have a relatively high proportion of students in special education, the pressure in Alberta is on students with severe disabilities and in Finland, the major part of the special support is delivered as preventative actions for student with mild difficulties.

Some disabilities or special needs identification can be measured and defined objectively, for example there is usually agreement whether a student is blind. But many are less well defined and/or have many differing definitions (e.g., learning disabilities, cognitive disabilities, giftedness and emotional/behavioural disabilities). Their determination requires considerable professional judgment and so results vary widely. There is wide variation in the number of students identified with disabilities by different countries, ranging from 0% in Iceland to 26% in Finland, 11-12% in the United States and 4-5% in most European countries (Ackerman undated, Ferguson 2008).

The two most common special education funding issues identified in the literature are efforts to find the best funding model and evaluating the match between models and accepted criteria. Thomas Parrish is the most prolific writer on the topic (2000, 2001, 2004, 2006 and 2008) in American journals.

Funding Models

While there is no agreement in the literature on which funding model is best, there is general agreement on the criteria that should be used to evaluate effectiveness. The criteria, initially developed by Hartman (1992) and expanded by Parrish (1994), are that the funding model be: understandable, predictable, flexible, adequate, have ease of reporting, be cost-based, allow for cost control, connect special education to general education, and be neutral in terms of identification and placement. It is recognized that no funding formula can meet all the criteria well, and that to focus on a particular criterion comes at the expense of addressing one or more of the others.

Many authors, from Noah and Sherman (1979) to Harr et al (2008), confirm that there is no single best approach to funding special education. Reviews of funding systems in Europe, Canada, the United States and Australia found that each country or state adopts its particular system of school financing as the result of a long process of adjustment and compromise to its particular context and policy goals. There are four basic special education funding models: (a) percentage reimbursement of costs, (b) pupil weighting system, (c) funding based on teachers and/or staff and (d) census-based funding. Most systems use some combination of the four, rather than a single model.

Each funding model carries with it planned and unplanned incentives and disincentives, which directly or indirectly influence the orientation, amount and types of service provided at the local level (NASBE 2002, Parrish 2006, Parrish and Harr et al 2008). Some models encourage identification of more students to generate more local revenue while others discourage such identification as it spreads fixed funding over more students. Some models encourage a particular placement such as a special class or special school by funding these at a higher rate than integrated settings. Greene and Forster (2002) compared states, which provided block grants or census based funding with those that provided a "bounty" for identified special education students, and found that the growth in special education numbers was significantly higher in those states that funded on the basis of identified students. Green (2007) suggests that vouchers for special education are a promising ideal for improving the quality of education and constraining growth.

Census-based or block funding is gaining popularity because of its simplicity but it may not be sensitive to the unique needs of each district's population given that severe disabilities and/or high cost students are not usually evenly distributed across districts. Models that include restrictions on use of funds or cost accounting by type of grant reduce the flexibility of districts and schools to pool funding for programs that could serve a diverse range of students including those with special education needs, English as a second language learner, or those who are disadvantaged. Some states include factors in their funding formulae for poverty, or average daily attendance.

Harr et al (2008) note frequently raised concerns about the burgeoning costs of special education litigation in the United States. Although these costs are estimated to account for only 0.3% of total special education spending, individual cases can be costly to districts and it is suspected that the threat of litigation may cause districts to provide more special education services than they believe are required.

In a pan-Canadian study of special education funding (McBride 2004), it was found that:

- Half the provinces/territories pool revenues from local and provincial/territorial sources and redistribute on a formula basis to local school authorities with the senior government providing 100% of the funding. In the other provinces/territories, central funding comprises 48% to 78%, with local school authorities responsible for the rest.

- All but two provinces/territories include some of their funding for special education in the base allocation.

- Most provinces/territories use some form of student identification to allocate some portion of their special education funding, particularly for severe disabilities.

- A predominant theme across most provinces/territories is increased flexibility for local jurisdictions accompanied by enhanced mechanism for accountability for student outcomes and adherence to provincial/territorial standards for programs and services.

Cost Pressures

School systems throughout the world are faced with rising numbers of special education students, increasing demands for services, and pressures to increase financial support for special education. Cost containment has been an increasing concern at all levels of the education system, with some fearing that special education funding is eroding the general education budgets. Parrish (2000, 2004) and Harr (2008) reviewed American studies examining spending in general and special education over periods of time ranging from five to 25 years and reported:
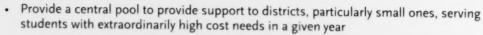
- Real gains in spending for both general education and special education

- Average general student spending increased faster than average special education student spending

- Rising special education expenditures were primarily due to rising identification rates rather than increasing per student expenditures (i.e., a volume rather than cost pressure)

- Special education enrolment as a percentage of total K-12 enrolments has risen virtually every year since national data was first collected in 1976-77

- Students with the same disability label have quite different levels of severity, which translate into wide variations in expenditures within the same disability category.
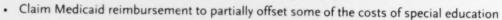
Parrish et al. (2004) note that while it is true that a growing number of students have severe disabilities, the most significant growth by far is in less severe categories of disabilities, particularly learning disabilities.

With the new emphasis on education accountability, special education may be increasingly viewed as the program of choice for students who fail to meet rising standards. And because parents may be more aware of the many services and rights available to children under special education law, they may believe that special education is the one program through which their children can receive help.

Parrish (2000, 2004) takes the position that much of the growth in special education enrollments and costs is due to the increasing tendency to place students in special education for a lack of better alternatives. NASBE (2002) identified strategies that could be considered by policy makers and practitioners to reduce special education cost pressures while ensuring students with special education needs receive the education services they require:

- Create a broader range of strong prevention and remedial programs as viable alternatives to special education as special education is neither the best or the most cost-effective intervention for students with relatively mild learning difficulties

- Ensure students have access to preventative and remedial programming before they are considered for special education

- Review and consider changing aspects of special education funding systems that create incentives for increased special education identification, especially in high-cost modes of service such as private placements or centralized, segregated services which may be less educationally effective

- Establish reasonable standards of service provision for students with varying needs to provide greater consistency and a more efficient system of services

- Track outcomes for students in relation to variations in program expenditures to provide better data on the efficacy of special education alternatives and cost-effectiveness

- Provide a central pool to provide support to districts, particularly small ones, serving students with extraordinarily high cost needs in a given year
- Claim Medicaid reimbursement to partially offset some of the costs of special education
- Encourage local district and regional cooperation and collaboration which is likely to facilitate more cost-efficient and cost-effective provision of students, particularly in serving students with low-incidence disabilities who require more intensive, costly services
- Early detection and prevention of health and sensory problems

It has been reported that the current system of educating disabled students provides financial incentives to schools to over-identify students as disabled and under-serve those that are identified (Greene 2007). Greene also states that an efficient alternative to the current system is to offer disabled students vouchers worth the cost of their education in public schools with which they can attend a private school if they wish. This article considers empirical analyses of the relationship between financial incentives and over-identification as well as the potential benefits of vouchers for special education. It concludes that vouchers for special education are a promising idea for improving the quality of education for disabled students while constraining growth in special education enrollments. Potential negative impacts of reduced social inclusion are not reflected.

One of the approaches to cost containment is to reduce the number of students being identified as having established categories of disability or special education needs. Categorical definition in special education requires that boundaries for membership become increasingly stringent to keep numbers and funding down (Jordan 2001) and demands for documentation of pathology increase.

Funding Adequacy

The adequacy of education funding and in particular special education funding appears to be a perennial issue. Both accountability and funding systems attempt to address the issue of adequacy of services and supports. When asked, most Canadian educators indicate that funding is inadequate as are available specialist and other services for students with special needs (Kierstead and Hanvey 2001, Jeary 2008). But perceptions of adequacy are rarely linked unequivocally to data.

There have been a number of American court cases related to adequacy of education funding. The resulting judicial pressure has forced many states to try to determine the minimum cost of providing an adequate education that will achieve their specified standard of educational outcomes (Harr et al 2008). In terms of special education, determining adequacy is more complex – how can the cost of adequacy be determined across the broad array and mix of services appropriate for diverse and individual special education students? It is suggested that consideration of adequacy may advance the concept of special education service standards – what services should be provided, what percentage of students might be expected to receive particular services, and what are reasonable class sizes and caseloads for specialists. It is also noted that adequacy in special education must also relate to adequacy standards for all students give the close interchange between them.

The following issues and trends are common to the recent special education literature:

- Expanding inclusive education policy
- Increasing diversity in classrooms
- Access to and expansion of the general curriculum
- Best practices associated with differentiating and personalizing learning
- Increased training and preparation for teachers and teaching assistants
- Better use of technology in the classroom
- More meaningful involvement by parents
- A collaborative approach to serving the student across government service networks
- Changes to funding and accountability models to address what have become unintended incentives

A key challenge may simply be to fully appreciate the scope and magnitude of the change and direction identified, particularly at a time of increasing demand for special education services. On the other hand, the increasing demand is itself viewed as a reflection of the need for systemic change.

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